

Message Text

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AMEMBASSY JIDDA PRIORITY
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E.O. 11652: N.A.

TAGS: BEXP, XB, XM, XT

SUBJECT: UNDER SECRETARIAL TASK FORCE ON U.S. FOOTWEAR
INDUSTRY-MARKET RESEARCH REQUEST
REF: A. STATE 263324 B. STATE 277571

1. MOST OF ADDRESSEE POSTS WERE ALERTED BY REFTEL A TO
ESTABLISHMENT BY COMMERCE UNDER SECRETARY HARMAN OF SPECIAL
TASK FORCE TO DEVELOP ACTIVE INTERNATIONAL MARKETING PRO-
GRAM ON BEHALF OF THE U.S. FOOTWEAR INDUSTRY AS COUNTERPOINT
TO EXTENSIVE FOREIGN PARTICIPATION IN THE U.S. MARKET. THIS
ACTION TAKEN IN RESPONSE TO INSTRUCTION OF THE PRESIDENT
TO ASSIST THIS INDUSTRY. REFTEL B SELECTED 13 POSTS TO SUB-
MIT MARKET RESEARCH DESK STUDIES ON BASIS OF REVIEW OF U.S.
EXPORT DATA, TOTAL IMPORTS OF FOOTWEAR BY FOREIGN MARKETS,
AND OPINIONS OF U.S. INDUSTRY EXPERTS. BY SIMILAR PROCESS,
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POSTS ADDRESSED THIS CABLE ARE BELIEVED TO REPRESENT MAR-
KETS HAVING GOOD CURRENT OR FUTURE POTENTIAL, AND ARE RE-
QUESTED TO SUBMIT DESK STUDIES USING SPECIFICATIONS CONTAINED
IN THIS CABLE AS A GUIDE.

2. THE SPECIFICATIONS OUTLINED IN PARA. FOUR BELOW REPRE-
SENT THE SCOPE OF THE INFORMATION WHICH INDUSTRY EXPERTS

DEEM NECESSARY TO DETERMINE THE INDIVIDUAL MARKET FOR SPECIFIC TYPES OF U.S. FOOTWEAR, AND TO PROVIDE CONVINCING EVIDENCE TO INDIVIDUAL AMERICAN MANUFACTURERS AS TO WHETHER

A MARKET EXISTS FOR THEIR PRODUCTS.

3. IN LEVYING THIS REQUEST, WE RECOGNIZE THAT THE ABILITY OF POSTS TO OBTAIN THE INFORMATION NEEDED WILL VARY ACCORDING TO THE SIZE OF THE DOMESTIC INDUSTRY, POSTS' CONTACTS WITH KNOWLEDGEABLE LOCAL INDUSTRY SOURCES AND AVAILABILITY OF PERSONNEL TO UNDERTAKE THIS STUDY IN A TIMELY AND EFFECTIVE FASHION. FOR THESE REASONS, POSTS ARE REQUESTED TO PROVIDE THE FOLLOWING INFORMATION WITHIN THREE WORKING DAYS OF RECEIPT OF THIS MESSAGE.

A. CAN STUDY BE COMPLETED BY MAY 5, 1978? IF NOT, WHAT IS ABSOLUTE MINIMUM TIME NEEDED?

B. IS IT NECESSARY FROM POST'S VIEWPOINT TO CONTRACT OUT ANY PORTION OF STUDY? IF SO, CITE OVERRIDING REASONS FOR CONTRACTING, INDICATE PORTIONS OF STUDY WHICH NEED TO BE CONTRACTED AND PROVIDE LIKELY COST RANGE OF CONTRACT.

C. WHAT, IF ANY, CHANGES WILL BE REQUIRED IN CCP OR CAP ACTIVITIES OR GOALS TO ACCOMMODATE STUDY?

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4. IN REPLYING TO FOREGOING QUESTIONS, POSTS ARE ASKED TO REVIEW CAREFULLY THE FOLLOWING SPECIFICATIONS DRAFTED BY INDUSTRY REPRESENTATIVES. VIRTUALLY ALL POSTS SHOULD, IN OUR VIEW, BE IN A POSITION TO OBTAIN MOST OR ALL OF THE INFORMATION REQUESTED IN PARAS A, B, C, AND G BELOW WITHOUT GREAT DIFFICULTY.

A. TOTAL APPARENT MARKET:SHOW TOTAL LOCAL PRODUCTION, IMPORTS, AND EXPORTS BY PRODUCT GROUP, GIVING PRIOR TWO YEARS, CURRENT YEAR, AND TWO YEAR PROJECTION. GIVE BOTH DOLLAR VALUES AND UNITS (PAIRS). ALSO SHOW RETAIL PRICE RANGE OF SHOES BY PRODUCT GROUP. DISCUSS REASONS FOR PROJECTIONS.

B. DISTRIBUTION OF TOTAL IMPORTS:SHOW IMPORT DISTRIBUTION BY PRODUCT GROUP AMONG LEADING THIRD COUNTRIES PLUS USA, GIVING PRIOR TWO YEARS, CURRENT YEAR, AND TWO YEAR PROJECTION. GIVE BOTH DOLLAR VALUE AND UNITS. SHOW RETAIL PRICE RANGE OF SHOES BY PRODUCT GROUP. DISCUSS REASONS FOR PROJECTIONS.

C. END-USERS ANALYSIS:GIVING PRIOR TWO YEARS, CURRENT

YEAR, AND TWO YEAR PROJECTION, INDICATE DISTRIBUTION OF POPULATION BY AGE GROUP, DISTRIBUTION OF PER CAPITA DISPOSABLE INCOME BY AGE GROUP.

D. DISCUSS PREFERENCES FOR STYLE, QUALITY, AND FIT, AND IDENTIFY SIGNIFICANT MARKET SUB-SEGMENTS. DISCUSS SIGNIFICANCE/STATUS ASSIGNED TO AMERICAN CLOTHING STYLES, EMULATION OF AMERICAN LIFE STYLE. INDICATE FITTING CHARACTERISTICS OF FEET: SIZE RANGES, COMMON FOOT SHAPES.

E. MARKETING COMPETITORS ANALYSIS: SET FORTH BY NAME INDIGENOUS AND THIRD COUNTRY MANUFACTURERS WHICH DOMINATE SALES OF FOOTWEAR, SHOWING APPROXIMATE MARKET SHARE. IDENTIFY PRODUCT LINES, SIGNIFICANT MARKETING STRENGTHS, UNCLASSIFIED

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AND RETAIL PRICE/F.O.B. PRICE STRUCTURES OF EACH COMPANY. INDICATE TOTAL NUMBER OF LOCAL MANUFACTURERS, AGGREGATE EMPLOYMENT AND PLANT INVESTMENT.

F. BUSINESS ENVIRONMENT: DISCUSS THE FOLLOWING: 1. DISTRIBUTION SYSTEM CUSTOMARY FOR FOOTWEAR, BOTH DOMESTIC AND IMPORTED. SHOW NUMBER OF COMPANIES AT EACH LEVEL AND MARK-UP ADDED. IDENTIFY KEY RETAILERS AND DISTRIBUTORS. CREDIT TERMS GENERALLY IN USE.

G. TARIFF AND NON-TARIFF BARRIERS: SET FORTH APPLICABLE DUTY RATES FOR EACH CATEGORY OF SHOES. LIST ALL NON-TARIFF BARRIERS. DISCUSS MOST GOVERNMENT'S GENERAL ATTITUDE TO SHOE IMPORTS, AND POTENTIAL FOR REDUCTION IN TRADE BARRIERS.

H. PROMOTION TECHNIQUES AND MEDIA MOST SUCCESSFULLY EMPLOYED.

5. APPLICABLE NON-RUBBER FOOTWEAR PRODUCT GROUPS ARE AS FOLLOWS:

A. MEN'S DRESS AND CASUAL. B. WOMEN'S DRESS AND CASUAL. C. CHILDREN. D. WESTERN BOOTS. E. MOCCASIN SLIP-ON. F. ATHLETIC. G. WORK SHOES/SAFETY (MEN'S ONLY). H. OUTDOOR BOOTS. I. WHITE DUTY SHOES. J. SECURITY FORCES DUTY SHOES (OXFORDS AND BOOTS).

6. ACTION REQUESTED: A) PLEASE REPLY TO QUESTIONS IN PARAGRAPH THREE ABOVE WITHIN THREE WORKING DAYS OF RECEIPT OF THIS MESSAGE. B) IMMEDIATELY COMMENCE STUDY IN ORDER TO MEET MAY 5, 1978 DEADLINE IF POSSIBLE. YOUR COOPERATION IN ASSISTING THE U.S. FOOTWEAR INDUSTRY UNCLASSIFIED

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